


# Accessing RetaEnroll from Retatrust.org

## Real People. Real Reta.

There are good reasons why Reta continues to add new members as they bring increasing value to those they serve. But this story is best told by the *Real People of Reta.*



 Play Video

CHARLES LAWRENCE  
CHIEF FINANCIAL OFFICER  
ROMAN CATHOLIC DIOCESE OF BOISE, ID



## Quality Healthcare. Catholic Values.

Welcome to Reta. We are a non-profit employer trust that has provided affordable, quality healthcare for employees and members of Catholic organizations nationwide for over 40 years.

Importantly, all Reta healthcare plans are designed to comply with the Ethical and Religious Directives of the Catholic Church.

**RetaMember**  
SIGN IN

User ID

Password

[Forgot User ID/Password](#)

**Log In**

Click below to learn more

- ▶ Reta Benefits Center (RBC)
- ▶ Reta Enroll
- ▶ Reta Wellness
- ▶ Reta Leadership Info

▶ About Reta

The Reta Advantage

Member Organizations

Reta Leadership

Contact Us

**Home**

# Select RetaEnroll to access the MyEnroll system

## Choose your destination

RetaAccess gives you access to all of Reta's benefits partners with just a single user name and password. Please choose your destination from the options below.



*The Benefits Center* provides a wealth of information about the benefits plans and options available to you.

RetaEnroll ✓

*RetaEnroll* lets you review and manage your benefits enrollment choices.

WebMD

*WebMD* provides a comprehensive, personalized wellness program for Reta members.

CLOSE

# Step 1 – Select the Employee

The screenshot shows the top navigation bar with tabs for Employees, Administrators, Cobra, Compliance, and Reta Billing. Below the navigation bar is a toolbar with buttons for Select Employee, Enrollment, Quick Links, Plan Year (set to 2016), Notes, Library, Reta Benefits Center, Reta Decision Tool, and Support. A message states "No Employee Selected" with a link to "Select Employee". Below this, instructions advise selecting the "Employees" tab. A section titled "Pending Tasks Requiring Your Attention" lists several review items, all with "(No Transactions Exist at this Time)".

Employees Administrators Cobra Compliance Reta Billing

Select Employee Enrollment Quick Links Plan Year 2016 Notes Library Reta Benefits Center Reta Decision Tool Support

No Employee Selected [Select Employee](#)

To search for an individual employee record, select the "Employees" Tab above.

**Pending Tasks Requiring Your Attention**

- Pending New Hires Requiring Review (No Transactions Exist at this Time)
- Pending Open Enrollments Review. (No Transactions Exist at this Time)
- [Pending Dependent Eligibility Verification Review .](#)
- Pending Open Enrollments Coverage Plans Review. (No Transactions Exist at this Time)
- Pending Transfers to Your Location (No Transactions Exist at this Time).
- Pending New Dependents Requiring Review. (No Transactions Exist at this Time)

# Step 2- Access Enrollment wizard

The screenshot shows the employee home page for Christine Rdr/rhd. The navigation bar is the same as in Step 1, but the Plan Year is now 2017. The "Selected" employee information is displayed. Below the navigation tabs, the "Annual Open Enrollment" button is highlighted in red, with a "Go" button next to it. A blue arrow points to the "Go" button. Other sections include "Name & Home Address", "Accounts", and "Classifications".

Employees Administrators Cobra Compliance Reta Billing

Select Employee Enrollment Quick Links Plan Year 2017 Notes Library Reta Benefits Center Reta Decision Tool Support

Selected CHRISTINE Rdr/rhd ID# 326433 Employer Church location 1 A/N 0007212-0001-000

**Employee Home Page \*\*\*\*\*Active (07/01/2009)\*\*\*\*\***

Home Coverage Coverage History Dependents Dependent Coverage ACA & Tax Forms Transfers

**Annual Open Enrollment** Go

**Name & Home Address** Edit

CHRISTINE Rdr/rhd  
326433 Main Str  
Anywhere, PA 62223

**Accounts**

Church location 1-(Active (07/01/2009))-326433

**Classifications**

CHRISTINE Rdrlrhd

Church location 1

Enrollment Type:

Enrollment Period:

Days Remaining to Enroll:

Annual Open Enrollment for 2017

04/27/2017 - 05/17/2017

1 Days

Welcome to Open Enrollment!

The Enrollment Wizard will guide you through each of the steps required to complete the enrollment process.

Open Enrollment Timeframe

You do not need to complete the enrollment process in a single session. You may return at any time during the Open Enrollment period to complete the process or make changes. The Open Enrollment period dates are displayed on the status bar at the top of this page, along with the number of days remaining in the Open Enrollment period.

Click on the **BEGIN YOUR ENROLLMENT** button to move automatically through each of the enrollment steps listed to the right.

Open Enrollment Resources

If you need more information or have questions about your benefits or the Open Enrollment process, the following resources are available:

**Benefit Plan Information:** To access information about your employee benefit plan options, select "Tools" from the left navigational menu and click on "Reference Library."

**Technical Assistance:** If you need assistance with the Enrollment Wizard, customer service contact information is located on the top right of this page, or go to "Tools" on left navigational menu and click on "Contact Service Rep."

**BEGIN YOUR ENROLLMENT**

CUSTOMER SERVICE

1.877.301-7382

Service@RetaEnroll.org

Enrollment Steps Navigation (Quick Links)

- Welcome
- ✔ Instructions
- ✔ Personal Information
- ✔ Dependent Information
- ✔ Reta Decision Tool
- ✔ Medical Plans
- ✔ Dental Plans
- ✔ Vision Plans
- ✔ Voluntary Employee Life
- ✔ Beneficiaries
- ✔ Summary

Selected Enrollment

1113 AN PPO 500-1..	\$158.50
Delta Dental Illi..	\$36.22
<b>Total Cost*</b>	<b>\$194.72</b>

\*Employee Per Pay Cost

Enrollment Type:

Enrollment Period:

Days Remaining to Enroll:

Annual Open Enrollment for 2017

04/27/2017 - 05/17/2017

1 Days

CUSTOMER SERVICE

1.877.301-7382

Service@RetaEnroll.org

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\*Employee Per Pay Cost



# Employee needs to submit verification documents for the below dependents.

## Dependents Requiring Verification Documentation


▶ Instructions for Validating Your Dependents

If you are not ready to upload your documents or to print the fax cover page now, you can return to this page by selecting 'Manage Dependents Verifications' from the left-side menu.

You have until **08/30/2017** to finish this process. Failure to submit correct documentation by this date may result in your dependent(s) not receiving coverage.

Employee Rdrlrhd, CHRISTINE (ID#326433)

Dependent	Birth Date	Number & Type of Documents Needed	Documents Upload or Fax
▼ Sample Dependent (Child)	02/02/2017	1 - <a href="#">Click to See Eligible Documents</a>	<input type="button" value="Upload"/> <input type="button" value="Fax"/>



No employee action needed- Dependents have been verified

## Dependents Requiring Verification Documentation


▶ Instructions for Validating Your Dependents

If you are not ready to upload your documents or to print the fax cover page now, you can return to this page by selecting 'Manage Dependents Verifications' from the left-side menu.

You have until to finish this process. Failure to submit correct documentation by this date may result in your dependent(s) not receiving coverage.

Employee Kpjdjhh, Beth (ID#826607)

Dependent	Birth Date	Number & Type of Documents Needed	Documents Upload or Fax
No records to display.			





Dependent	Birth Date	Number & Type of Documents Needed	Documents Upload or Fax	
▼ Sample Dependent (Child)	02/02/2017	1 - <a href="#">Click to See Eligible Documents</a>	<input type="button" value="Upload"/>	<input type="button" value="Fax"/>
RECORD_ID	FILE_NAME	STATUS	ACTION	
No records to display.				

***Fax or Mail Option***

**Use this Option to print and mail/fax your supporting documents**

1. Generate a personalized, bar-coded Fax/Mailing Coversheet
2. Print the personalized, bar-coded Fax/Mailing Coversheet
3. Mail or fax the supporting documents, along with the Coversheet. Faxing and mailing instructions are located on the Coversheet you print.

**If you are submitting documentation for more than one dependent, you MUST use a separate fax cover sheet for each dependent and fax them separately. Make sure to use the correct personalized cover sheet for each fax transmission.**



## Your Pending Elections

Pending elections indicate a request for coverage and will not be effective without administrative and/or insurance ca

Name	Benefit Plan	Benefit Level	Pending	Your Cost	Effective Date
Dependentd, Sample	1113 AN PPO 500-1 (GOLD PLAN)	Employee + One	Add	N/A	07/01/2017

## Your Dependents

Full Name	Relation	DOB	Gender
Dependentd Sample	Child	02/02/2017	Male

**Please read this entire page and choose the appropriate button located below.**

I hereby acknowledge that I have read and understand the informational materials provided by my employe

I acknowledge that the benefit elections confirmed by me, are irrevocable and may not be changed until the procedures as described in the informational materials for making such a change. By choosing the "Finalize deduction, for the benefits that I elected and confirmed by me, and such authorization is voluntary.

## Your Electronic Signature

I Accept     I do not Accept

Finalize

**(If you "Finalize" you still will be able to return to this enrollment wizard later to make changes until the end of the Enrollment Period).**



- ***Enrollment Status Report***

- *Take Away*- How far did your employee get in the enrollment process.

## Accessing Reports

The screenshot displays a software interface with a dark blue navigation bar at the top containing the following tabs: **Employees**, **Administrators**, **Cobra**, **Compliance**, and **Reta Billing**. A blue arrow points from the top left towards the **Administrators** tab.

Below the navigation bar, the interface is divided into two main sections: **Tasks** and **Reporting**. The **Reporting** section is highlighted with a blue arrow pointing to the **Access Report Generator** option.

**Tasks**

- Receive Secure Files
- Send Secure Files
- Manage Pending New Hires
- Manage Employee Transfers
- Generate OE Enrollment Kits

**Reporting**

- Access Report Generator
- View Employee Changes
- Add/Termination History

On the left side of the interface, there is a sidebar with the following elements: a red icon and the text "Select Emp", "Selected CHRIST", "Employee", "Filter", and "Recent".

# Open Enrollment Reports


## Report Generator

Reports By Group	Favorites
▼ Census Reports	
<a href="#">Active Employees with Active Dependents</a>	<a href="#">Add To Favorites</a>
<a href="#">Active Employees with Inactive Dependents</a>	<a href="#">Add To Favorites</a>
<a href="#">Basic Active Employees Personal &amp; Address Data Census(Excludes Active COBRA)</a>	<a href="#">Add To Favorites</a>
<a href="#">Beneficiaries List</a>	<a href="#">Remove From Favorites</a>
<a href="#">Census Report</a>	<a href="#">Remove From Favorites</a>
<a href="#">Census Salary Report</a>	<a href="#">Add To Favorites</a>
<a href="#">Enrollment Status Report</a>	<a href="#">Remove From Favorites</a>
<a href="#">HRB Location Map</a>	<a href="#">Add To Favorites</a>
> Favorites	
▼ Coverage Reports	
<a href="#">FSA - List of All Participants</a>	<a href="#">Add To Favorites</a>
<a href="#">Pending Election Report</a>	<a href="#">Remove From Favorites</a>

***Enrollment Status Report***



## Enrollment Status Report example

 <b>Enrollment Status Report</b>										
Trustor	Location	HRB #	Class Code - Description	BAS #	Last Name	First Name	Last Page Accessed	Enrollment Wizard Access Date	Last Login Date / Time	
Master acc 0007212	Church location 1	040	IX - Benefits Ineligible	958660	Akeckia	Mary Ellen	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	V - Retired Priests	326539	Bftrnj	DONALD	Did not access OE Wizard		5/4/2011 9:36:11 AM	
Master acc 0007212	Church location 1	040	V - Retired Priests	326695	Bftrnf	THEODORE	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	I - Lay Employees	621025	Bprlzzf	Lucia	Completed	5/3/2017 4:54:41 PM	5/3/2017 4:53:35 PM	
Master acc 0007212	Church location 1	040	I - Lay Employees	327018	Bqeyssi	DAVID	Completed	5/7/2017 8:32:30 PM	5/7/2017 8:28:49 PM	
Master acc 0007212	Church location 1	040	V - Retired Priests	326941	Brfzfpb	JAMES	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	II - Priests	326242	Buicqic	EDWARD	Completed	4/30/2017 10:18:28 PM		
Master acc 0007212	Church location 1	040	V - Retired Priests	326669	Cftrnj	DAVID	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	V - Retired Priests	326923	Cznhrud	ROBERT	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	V - Retired Priests	326575	Dpdxdaf	JAMES	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	V - Retired Priests	326730	Eocwcea	HENRY	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	VI - Retired Lay Employees	325991	Fdrldnb	DOROTHEA	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	IX - Benefits Ineligible	659808	Fgigcii	Sr. Mary Fran	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	IX - Benefits Ineligible	811002	Fkecccc	Marlene	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	IV - Seminarians	964598	Fuowauj	Nicholas	Completed	4/30/2017 10:49:09 PM		
Master acc 0007212	Church location 1	040	V - Retired Priests	326922	Fymgmwc	JOHN	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	V - Retired Priests	579759	Gjrfthj	JAMES	Did not access OE Wizard		4/22/2013 3:36:54 PM	
Master acc 0007212	Church location 1	040	I - Lay Employees	677604	Gsumgee	Michael	Completed	5/2/2017 2:51:05 PM	5/2/2017 2:40:51 PM	
Master acc 0007212	Church location 1	040	I - Lay Employees	511272	Hioymuc	Judy	Completed	5/4/2017 10:45:03 AM	4/29/2016 9:29:05 AM	
Master acc 0007212	Church location 1	040	V - Retired Priests	697330	Hkmysea	LEO	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	IV - Seminarians	908147	Hpjrvh	Anthony	Completed	4/30/2017 10:50:56 PM		
Master acc 0007212	Church location 1	040	I - Lay Employees	754821	Hpnlpvb	Kathleen	Completed	5/1/2017 9:45:38 AM	5/1/2017 9:38:28 AM	
Master acc 0007212	Church location 1	040	I - Lay Employees	415756	Hqakceg	MARY	Completed	5/5/2017 10:29:02 AM	5/5/2017 9:55:26 AM	
Master acc 0007212	Church location 1	040	V - Retired Priests	326239	Hrfzfnj	VINCENT	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	V - Retired Priests	326632	Huidgic	STEPHEN	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	IX - Benefits Ineligible	770925	Hzxppzf	Joan	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	II - Priests	697221	Jftrnvb	NICHOLAS	Completed	5/3/2017 11:46:48 AM	4/22/2016 12:47:10 PM	
Master acc 0007212	Church location 1	040	I - Lay Employees	588759	Jpvxfhj	William	Completed	5/3/2017 4:32:35 PM	5/3/2017 4:08:01 PM	
Master acc 0007212	Church location 1	040	IX - Benefits Ineligible	958489	Jvprvlj	Ada	Did not access OE Wizard			
Master acc 0007212	Church location 1	040	I - Lay Employees	326614	Koqkqoe	TINA	Completed	5/1/2017 1:35:59 PM	5/1/2017 11:42:28 AM	

## Who completed Open Enrollment and who did not

Last Name	First Name	Last Page Accessed	Enrollment Wizard Access Date
Akeckia	Mary Ellen	Did not access OE Wizard	
Bftrnj	DONALD	Did not access OE Wizard	←
Bftrrf	THEODORE	Did not access OE Wizard	
Bprlzf	Lucia	Completed ←	5/3/2017 4:54:41 PM ←
Bqeyssi	DAVID	Completed	5/7/2017 8:32:30 PM
Brfzpb	JAMES	Did not access OE Wizard	
Buicqc	EDWARD	Completed	4/30/2017 10:18:28 PM
Cftrnj	DAVID	Did not access OE Wizard	
Cznhnd	ROBERT	Did not access OE Wizard	
Dpdxdf	JAMES	Did not access OE Wizard	
Eoowca	HENRY	Did not access OE Wizard	
Fdrfndb	DOROTHEA	Did not access OE Wizard	
Fgigcii	Sr. Mary Fran	Did not access OE Wizard	
Fkeccc	Marlene	Did not access OE Wizard	
Fuowau	Nicholas	Completed	4/30/2017 10:49:09 PM
Fymgrmc	JOHN	Did not access OE Wizard	
Glrjfhj	JAMES	Did not access OE Wizard	
Gsumgee	Michael	Completed	5/2/2017 2:51:05 PM
Hioymuc	Judy	Completed	5/4/2017 10:45:03 AM

A person wearing a blue suit jacket and a white shirt is holding a white rectangular sign with both hands. The sign has the word "QUESTIONS?" written on it in a bold, dark blue, sans-serif font. The background is a plain, light grey color.

**QUESTIONS?**